

Project Name:	Department of Energy BMIS-FM
Project Number:	BMIS-FM Phase I
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IBM Proj Mgr:	Don A. Cox, PMP



SCHEDULE MANAGEMENT PLAN for *Department of Energy BMIS-FM Project*

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Version number	Date	Summary of changes	Revised By
1.01	31 Oct 00	First version	Don A. Cox, PMP
1.02	04 Dec 00	Revised version after review by M. Fraser	Don A. Cox, PMP
1.03	20 Dec 00	Changed footer from 'Confidential' to 'Proprietary'	Don A. Cox, PMP

Approvals

The following people have approved this document. (Sign below name)

Name	Function
Michael Fraser	DOE Program Manager
Signature	Date:

Don A. Cox	Team IBM Program Manager
Signature:	Date:

Distribution

This document has been distributed to:

Name	Function

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Schedule Management Plan

1. Objectives

- 1.1. The purpose of this document is to define and document how changes to the schedule will be managed for this project.

2. Expected Stability of Project Schedule

- 2.1. The project schedule as originally published in the DOE SOW and proposal response from Team IBM is subject to change.
 - 2.1.1. Because of time involved in evaluating and selecting the winning bidder, and creating the project task order, formal contractual arrangements were not provided until early September, 2000 and signed on September 5, 2000. DOE and Team IBM immediately mobilized resources to begin the project at that time.
 - 2.1.2. The reality of Federal appropriations requires that both DOE and Team IBM demonstrate an awareness of possible scheduling impacts related to delayed or minimized funding requests, appropriations or apportionments, and both recognize that these factors may impact the stability of the project schedule.

3. Schedule Variance Response Process

- 3.1. Once the project schedule is baselined, the Team IBM project manager is responsible to ensure that actual effort, start and end dates are entered for each activity. This data is essential to establish whether schedule variances exist.
- 3.2. Major Problems
 - 3.2.1. On a regular basis, but not less than once per month within 3 business days of the month-end, the Team IBM project manager will create an earned value report. Using this report, the Team IBM project manager will identify and isolate both positive and negative schedule variances.
 - 3.2.2. Any schedule variance of greater than + / - 5% of the aggregate project schedule will require development of a schedule variance analysis report to determine the root cause.
 - 3.2.3. Any schedule variance of greater than + / - 20% for a single project activity or task will require development of a schedule variance analysis report to determine the root cause.

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- 3.2.4. When a variance exceeds the limits established above, the DOE and Team IBM project managers must determine what is causing the variance and decide if the variance requires corrective action.
- 3.2.5. If the schedule variance corrective action is relatively minor, it may be documented on the schedule Variance Analysis Report in the field provided. However, if the corrective action is more detailed, a separate corrective action report – schedule control should be completed.
- 3.2.6. If corrective action is required, it is up to the discretion of the DOE project manager as to whether a schedule change request is necessary, or if the variance can be absorbed within the existing project schedule. If a schedule change request is necessary, it is submitted through the standard schedule change control procedures as outlined below.
- 3.3. Minor Problems
 - 3.3.1. Minor variances will be absorbed into project through schedule changes or shifting of project resources.

4. Schedule Change Control Processes

- 4.1. All schedule modifications must go through the following Change Control process:
 - 4.1.1. Identify and assess the schedule change. These would typically be generated from a schedule variance analysis or corrective action report – schedule control, but not necessarily.
 - 4.1.2. Fill out a “*Change Request Form*” and submit the “*Change Request Form*” along with required supporting documentation to the Team IBM project manager.
 - 4.1.3. The Team IBM project manager will review the change request and may possibly request additional documentation prior to review with the DOE project manager.
 - 4.1.4. The Team IBM and DOE project managers will jointly evaluate the change. The DOE project manager, in his capacity as the Contracting Officer’s Representative, ultimately decides if the schedule change will be accepted or not. Using the “*Change Request Form*”, the DOE project manager will mark the change as:
 - 4.1.4.1. Approved, in which case both project managers will check the approved box, sign off on the change request and the Team IBM project manager will incorporate the change and adjust other project planning factors as necessary.

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4.1.4.2. Approved pending additional supporting documentation, in which case both project managers will check the approved / pending box, sign off on the change request and the Team IBM project manager will specify and coordinate gathering of the required documentation, incorporate the change and adjust other project planning factors as necessary.

4.1.4.3. Denied, in which case both project managers will check the denied box, sign off on the change request and the Team IBM project manager will notify the requestor of the status and reason for denial.

4.1.5. The project manager will document the Change Request outcome as necessary (update WBS, schedule and budget documentation if impacted).

5. Associated Documents

- 5.1. Schedule Variance Analysis
- 5.2. Corrective Action Report – Schedule Control
- 5.3. Project Schedule
 - 5.3.1. Activity Duration Estimates
 - 5.3.2. Resource Requirements
 - 5.3.3. Calendars
 - 5.3.4. Lead and Lag Times
- 5.4. Assumptions and Constraints
- 5.5. Cost Baseline